

Why CPQ projects fail

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Today's presenters



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Common indicators for change



“Swivel chairing” between apps



Long sales cycles



Lack of visibility to customer activity



Headcount growth is proportional to revenue



Challenges with on-time, accurate renewals



Volume of billing disputes

Root causes

Limited governance across all service lines
Growth through M&A

Reps responding slower to customers from cumbersome manual processes

System architecture not aligned with customer journey

Lack of process automation and systemic controls to scale operations

No automation of renewal opportunities, impacts visibility
High volume of “touch” renewals

Complex product catalog and rogue discounting
Lack of clear visibility of terms and upstream controls

Challenges with Quote-to-Cash optimizations

Effective decision-making

- Decision-making process
- Delegating authority
- Handling leadership changes, misaligned vision
- Lack of quantitative analysis to support decisions

Technology before holistic strategy

- Implementing systems without fixing underlying root cause
- Lift & Shift vs. Innovate
- Highly customized systems

Keeping “legacy” without a plan for retirement

- Legacy agreements with large customers
- Historical data challenges

Balancing optimization vs. daily responsibilities

- Time management
- Calibrating management expectations
- Employee burn-out

Establishing tight customer hand-offs

- Sales to Professional Services (PS)
- Sales to Fulfillment
- Sales to Finance
- PS to Support

Considerations before integrating

01

Current state
assessment

02

Defining vision
and goals

03

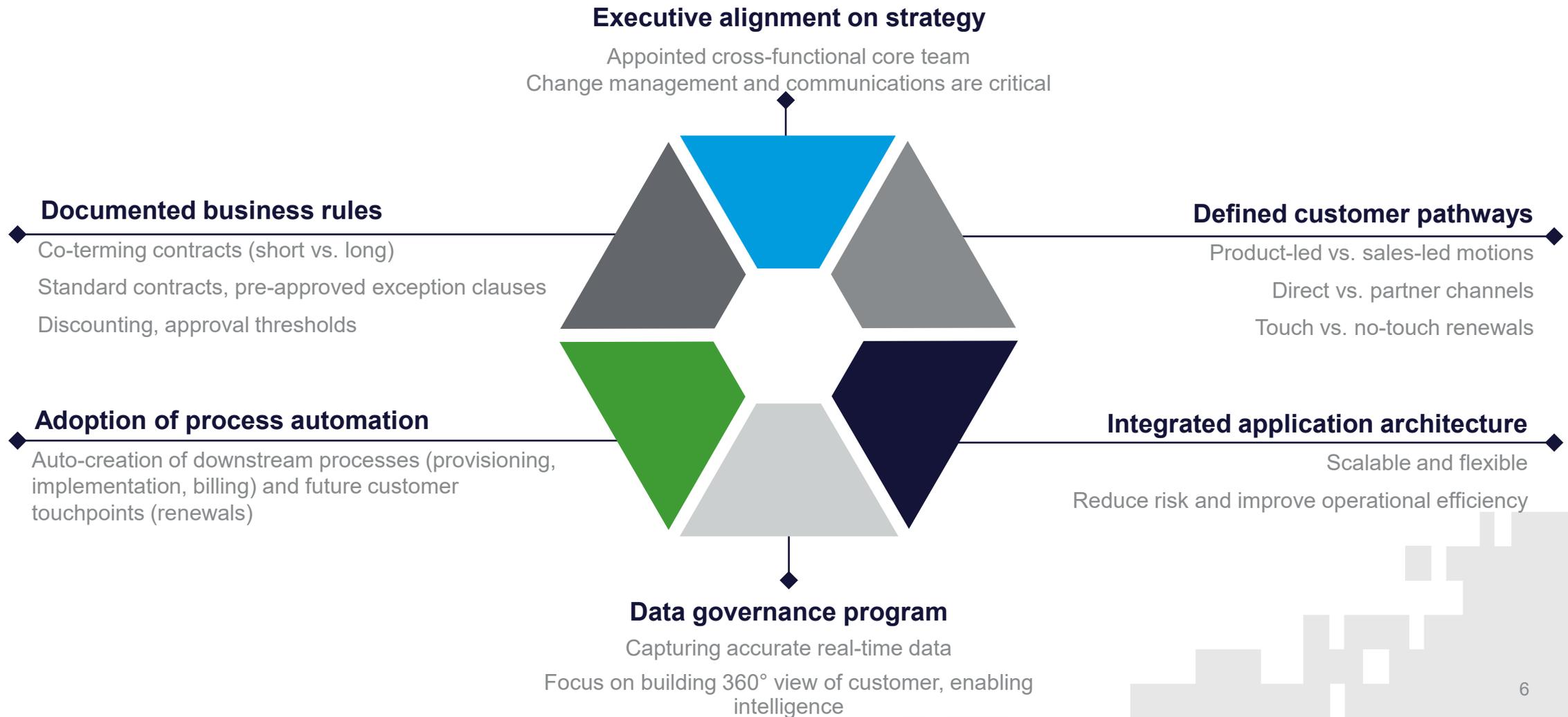
Creating an
actionable
implementation
plan

04

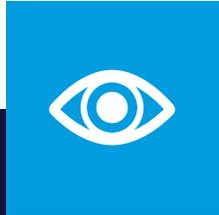
Evaluating
budget and
resources

High-value, leading practices of Quote-to-Cash

Based on our experience, there are 6 enablers for successful business optimization through quote-to-cash.



Readiness factors



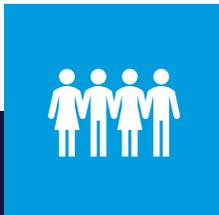
Clear vision and goals



Objective assessment of current state



People, Process, Technology, and Data roadmap



Budget and resource availability



Project execution capabilities and domain expertise



Actionable plan with potential phased approach

Thank you

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